AmpliFund

Grant Maker Pre-Award Core Series

Application Configuration

Core Series Overview

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- **Training 1**: AmpliFund & Illinois System Integrations
- **Training 2**: Pre-Award - Master Data, Fund, Opportunity
- **Training 3**: Pre-Award - Application Configuration
- **Training 4**: Pre-Award - Scoring/Reviewer Field Set-up & Application Testing
- **Training 5**: Pre-Award - Application Review Workflow Configuration & Testing

Agenda

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- Form Templates
- Application Forms
- Budget Template
- Performance Plan Template
- In-Product Demo
- Next Steps
- Customer Support
- Question & Answer

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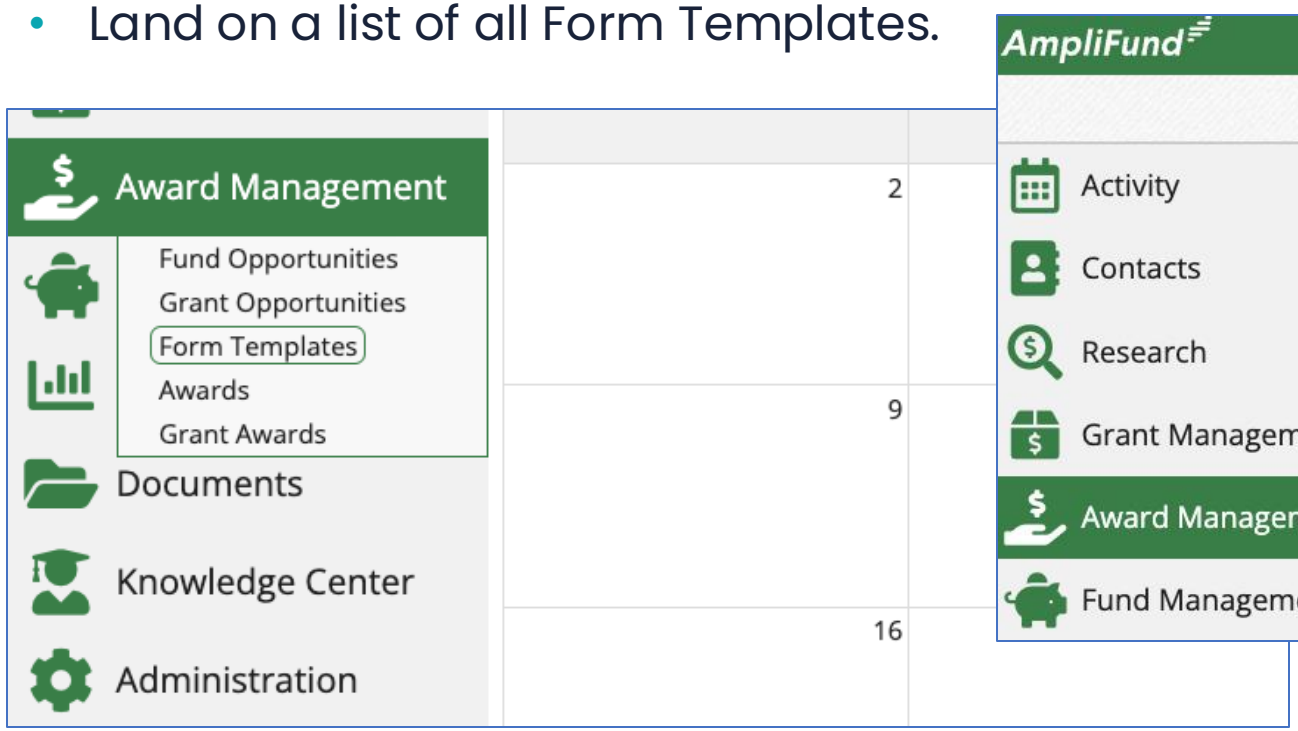
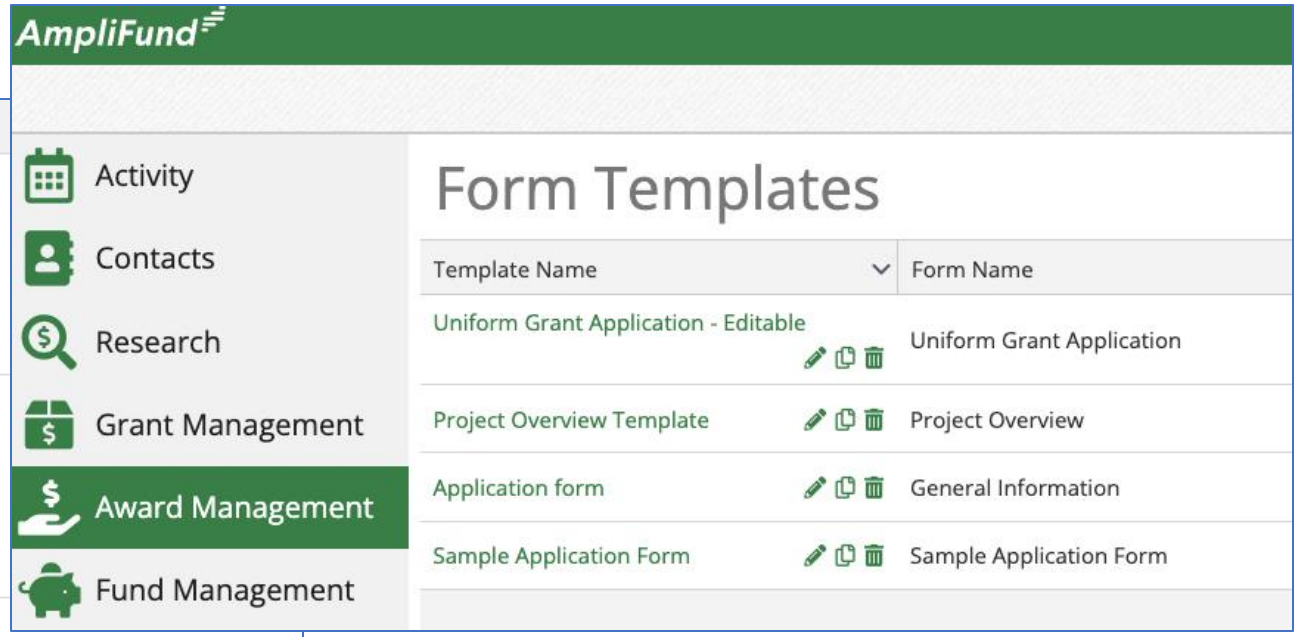
Form Templates

Access Form Templates

- Form Templates are a way to create standard and reusable Application Forms.
- Log in to AmpliFund.
- Click on Award Management > Form Templates.
- Land on a list of all Form Templates.





Edit, Copy, Delete Form Templates

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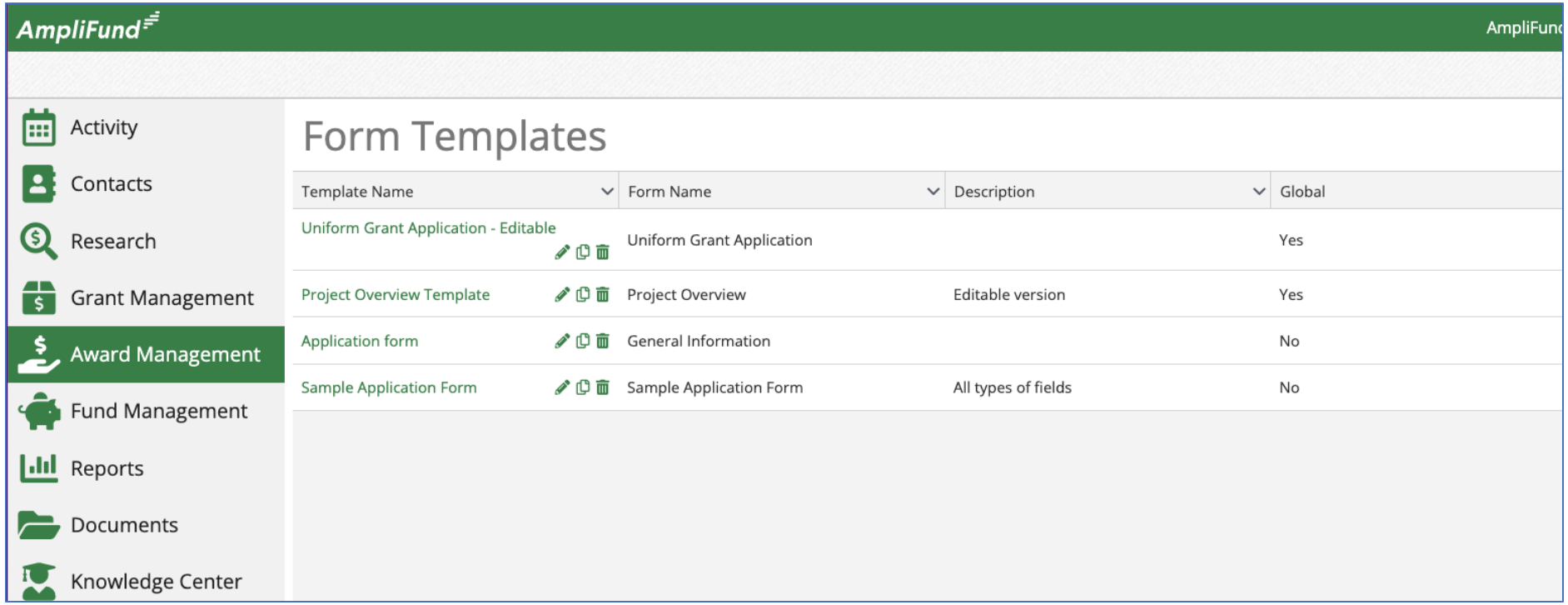
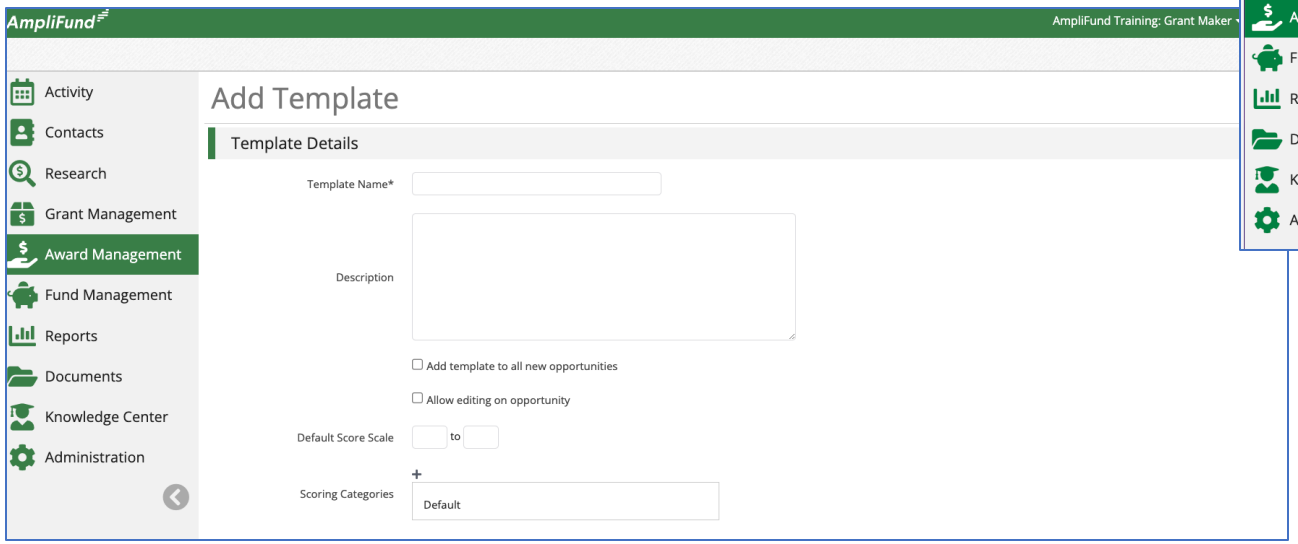
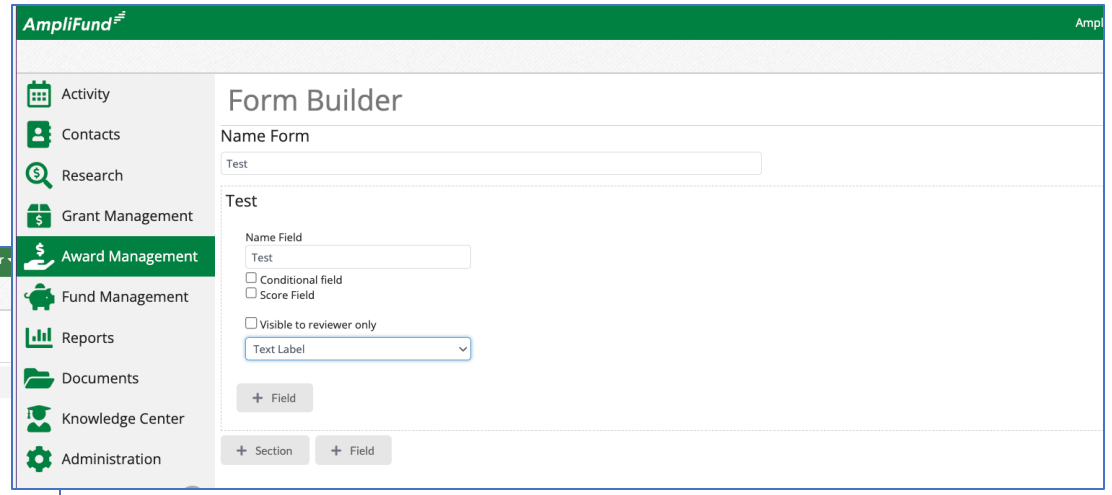
- Click on the pencil edit icon to edit the template.
- Click on the paper edit icon to copy the template.
- Click on the trashcan icon to delete the template.



Create Form Template

- Click on the + icon on the top right of the screen.
- Configure the Template Details.
- Name Form.
- Add Sections.
- Add Fields.
- Click Create on the bottom right of the screen.





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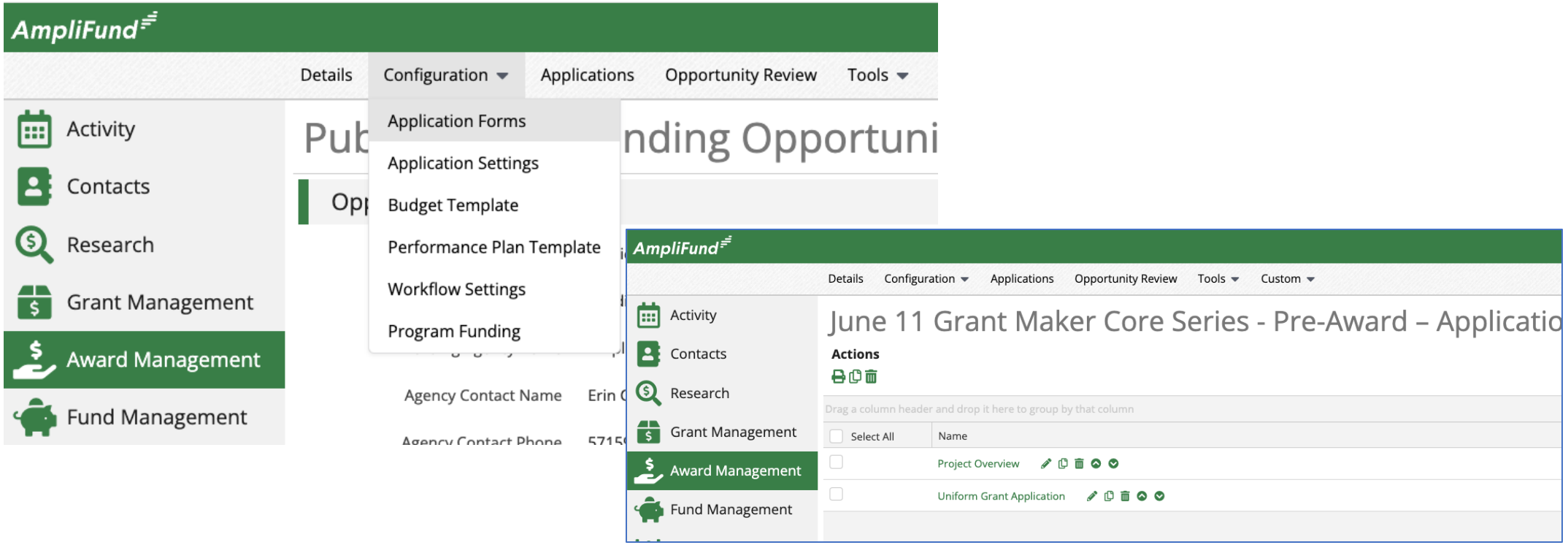
Application Forms

Access Application Forms

- Navigate to the appropriate Opportunity.
- Click on Configuration > Application Forms.
- Land on a list of all Application Forms for that Opportunity.



Edit, Copy, Delete Application Forms

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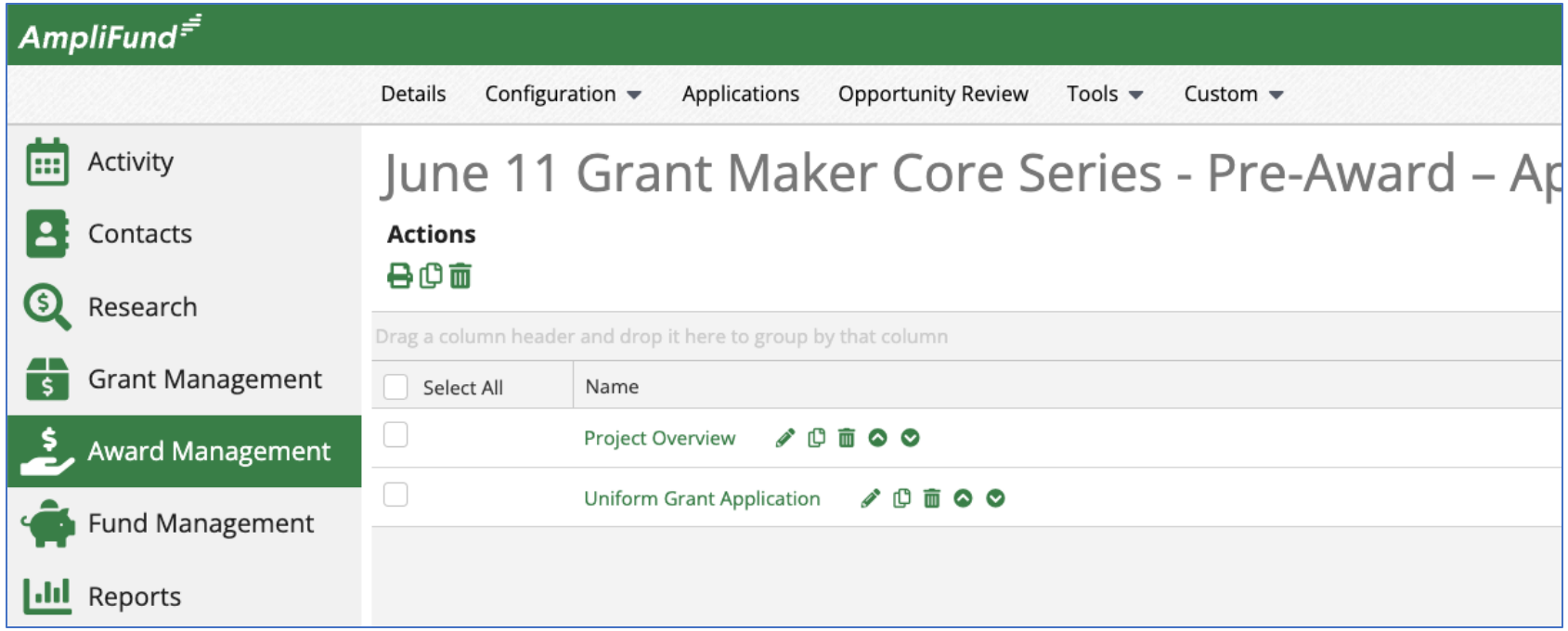
- Click on the pencil edit icon to edit the template.
- Click on the paper edit icon to copy the template.
- Click on the trashcan icon to delete the template.



Add New Application Form

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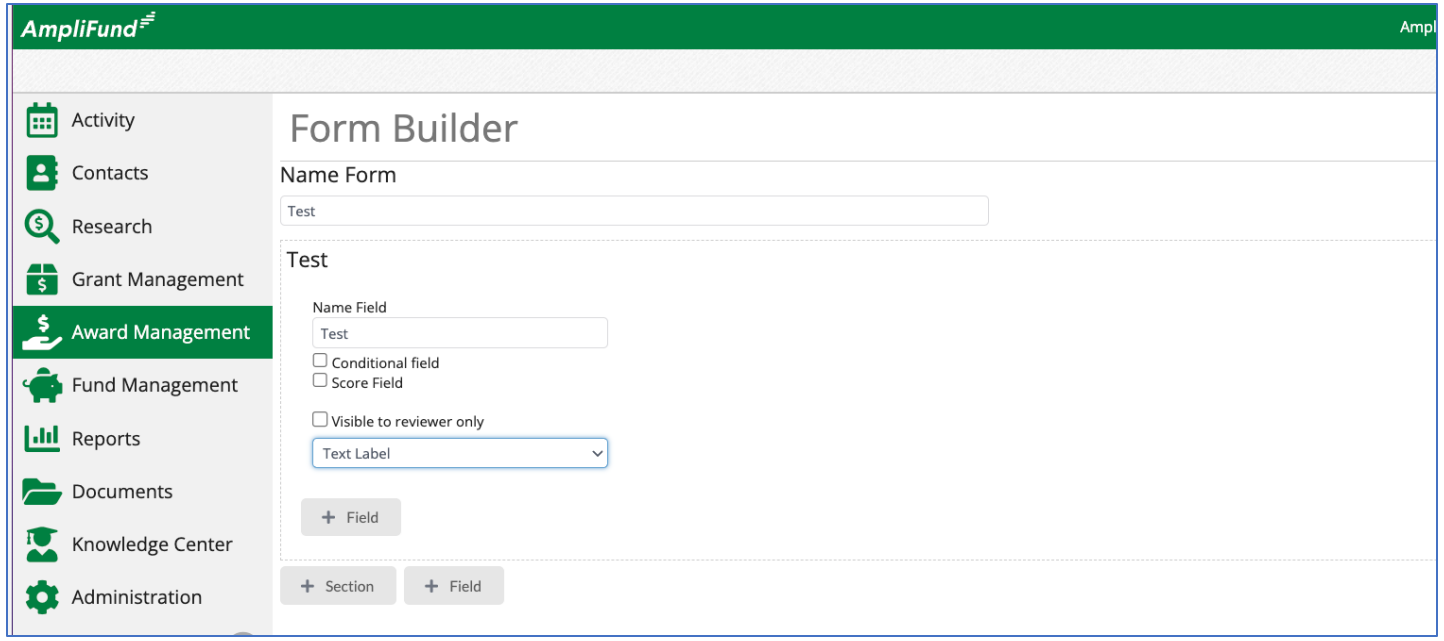
- Click on the + icon on the top right of the screen.
- Enter the Name.
- Add Sections.
- Add Fields.



Field Types

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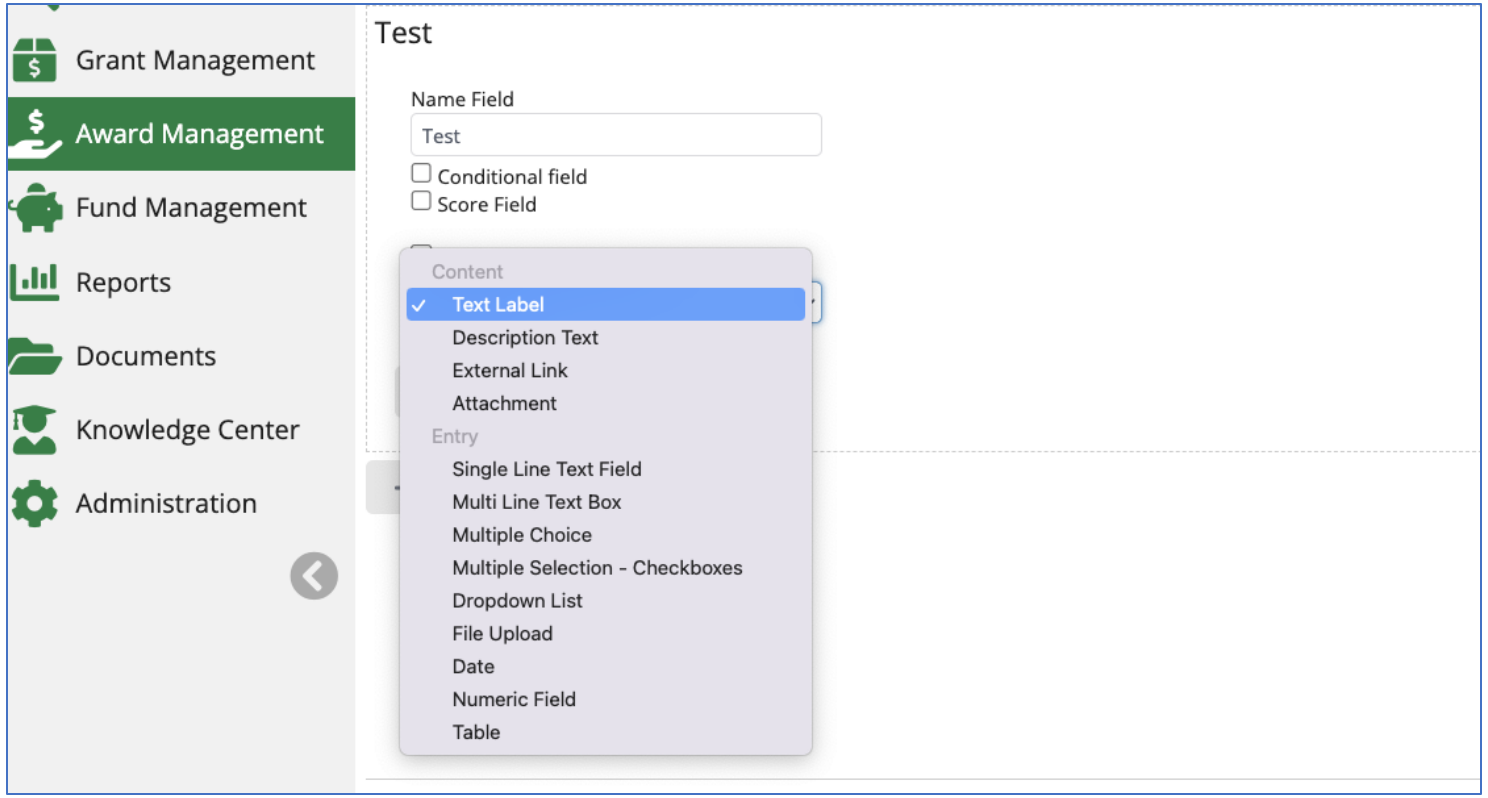
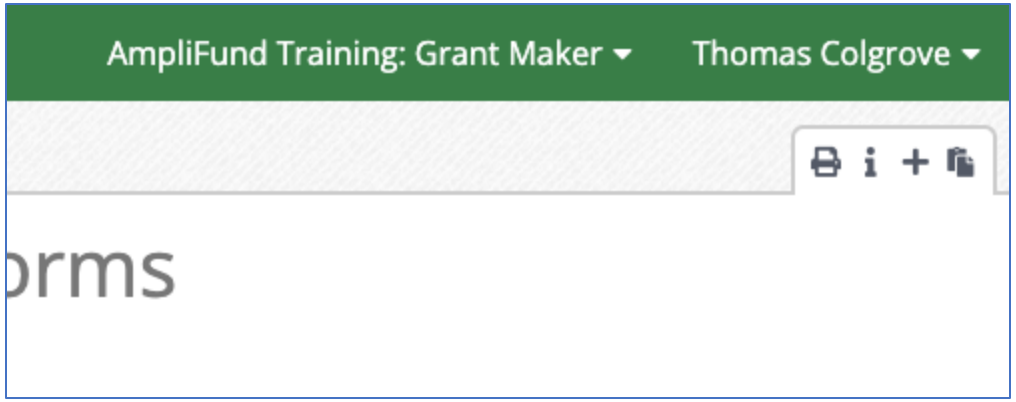
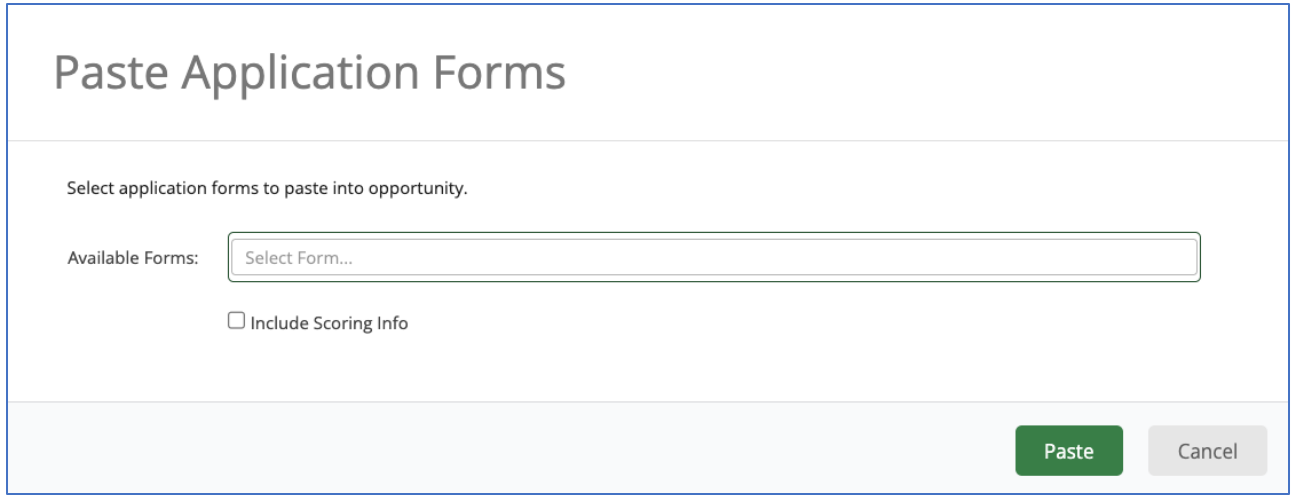
- Content - Data funders provide applicants.
- Entry - Data applicants provide funders.



Paste Form Templates and Application Forms

- Click on the paste icon on the top right of the screen to add Form Template or Application Forms from your account.
- Select the Form.
- Include scoring information if needed.
- Click Paste on the bottom right of the screen.





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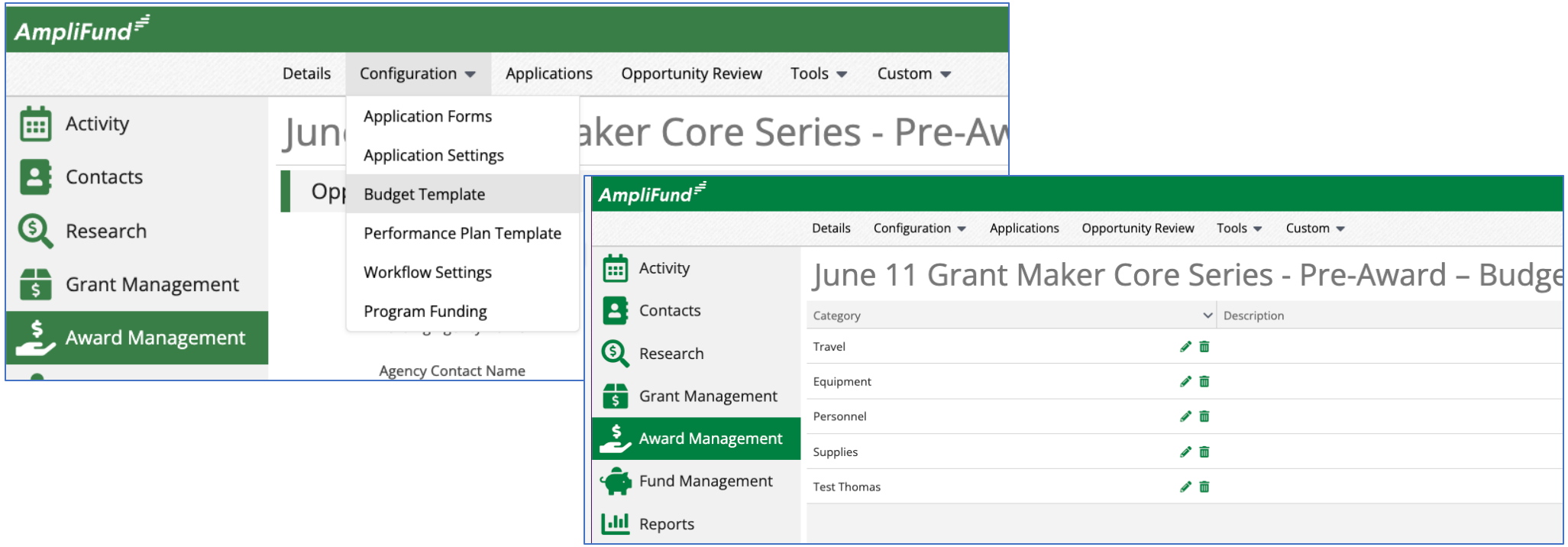
Budget Template

Access Budget Template

- Navigate to the appropriate Opportunity.
- Click on Configuration > Budget Template.
- Land on the Budget Template.



Add Budget Categories to the Budget Template

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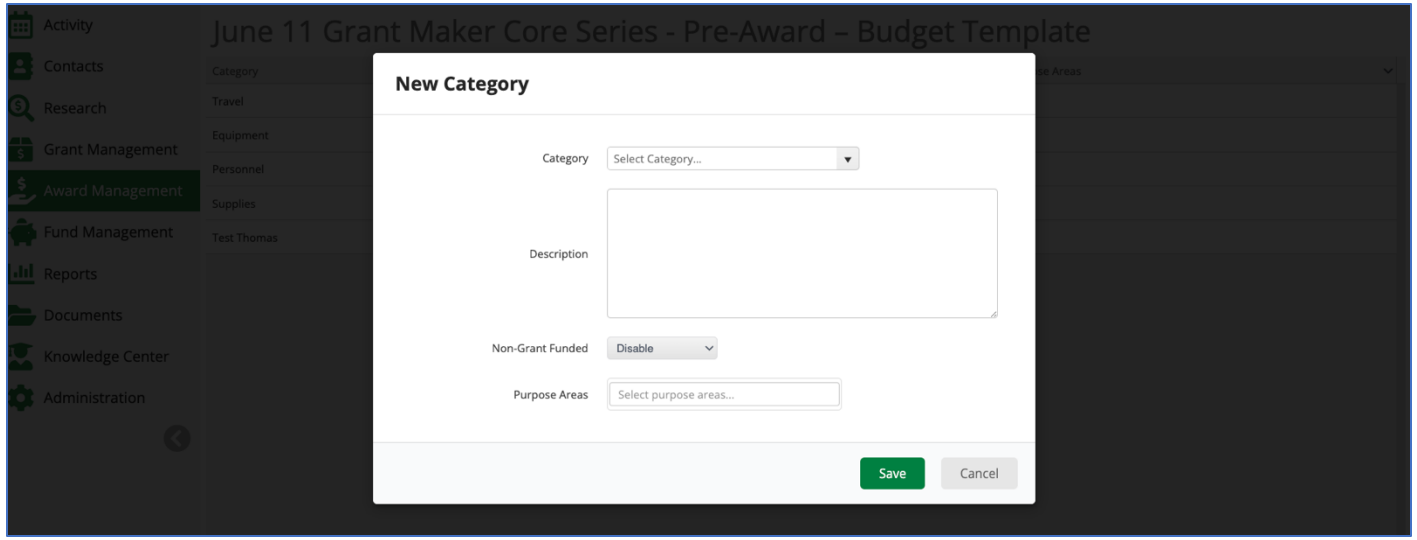
- Click on the + icon on the top right of the screen.
- Select the Category.
- Enter the Description (Optional).
- Configure the Non-Grant Funded option.
- Add Purpose Areas (Optional).
- Click Save on the bottom right of the screen.



Edit, Delete Budget Categories

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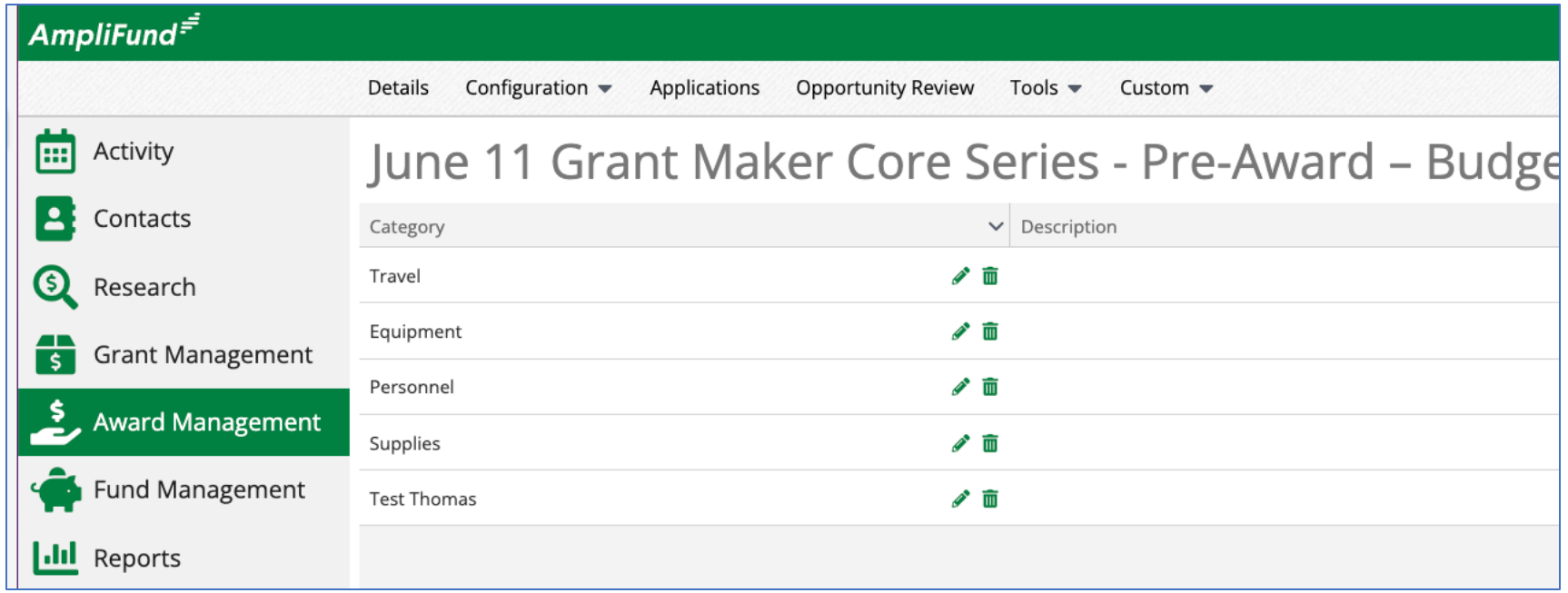
- Click on the pencil edit icon to edit the Category.
- Click on the trashcan icon to delete the Category.



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Performance Plan Template

Access Performance Plan Template

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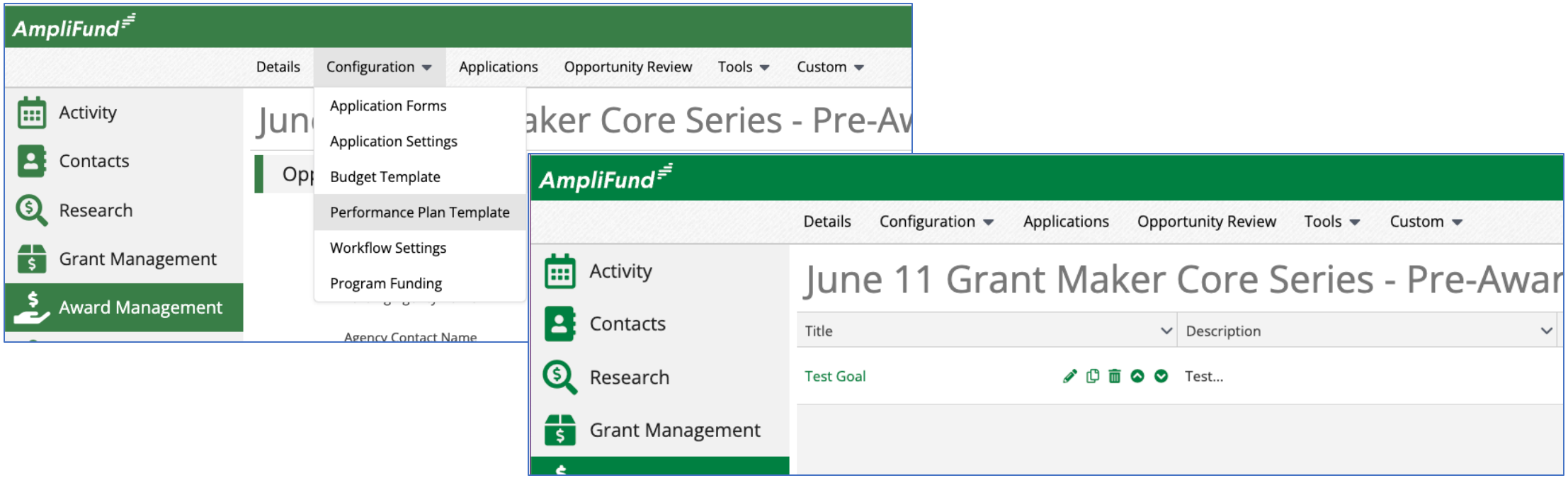
- Navigate to the appropriate Opportunity.
- Click on Configuration > Performance Plan Template.
- Land on the Performance Plan Template.



Add Performance Plan Goal

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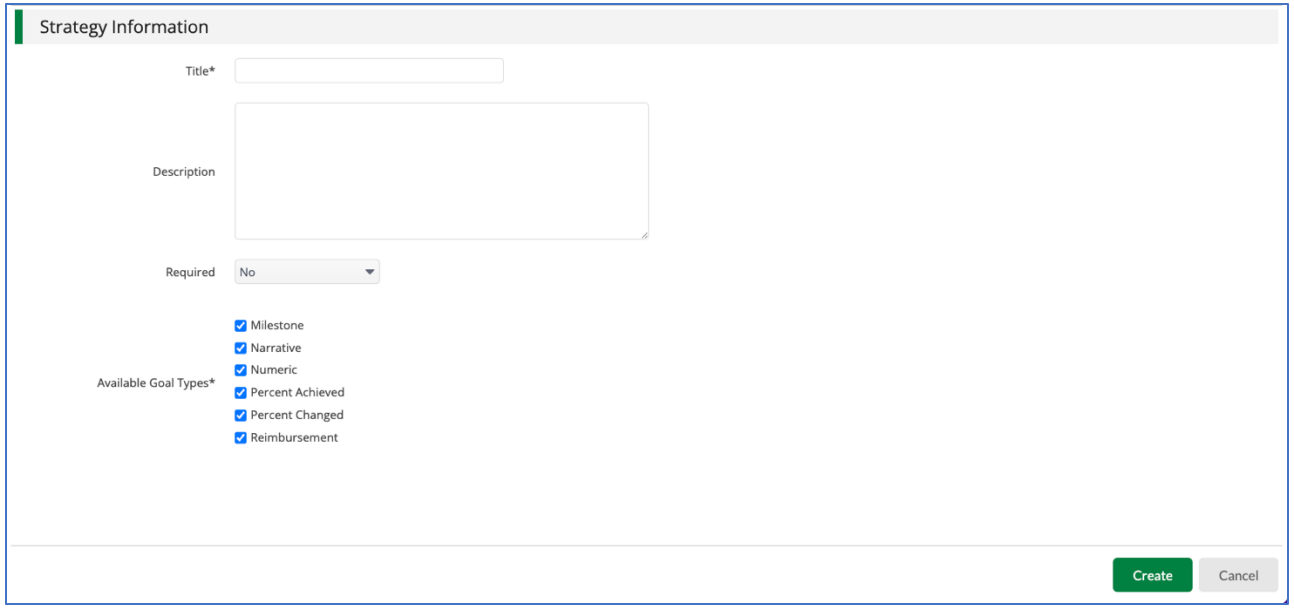
- Click the + icon on the top right of the screen.
- Enter the Title.
- Enter the Description (Optional).
- Select the Required option.
- Configure Allowable Goal Types.
- Click Create on the bottom right of the screen.



Performance Plan Goal Types

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Goal Type	Definition	Example
Milestone	The most basic goal type. They allow for tracking progress as a “Yes” or “No” response by the Responsible Individual.	Create and send Q1 Staff Survey.
Narrative	Question and answer goals. Responsible Individuals may answer the question posed by the goal.	How successful was the grant-related activity this period?
Numeric	A discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed.	“Number of program participants” with a goal target of 50.

Performance Plan Goal Types

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Goal Type	Definition	Example
Percent Achieved	Goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	“Volunteer Retention Rate” with a goal target of 70%.
Percent Changed	Goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	“Decrease in Student Absences” with a starting absentee rate of 10% and a goal absentee rate of 3%.
Reimbursement	Goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, Responsible Individuals may enter Units Achieved.	“Number of Patient Screenings” with target/maximum units of 100, and a reimbursement rate per unit of $22.

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In-Product Demo

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Next Steps

Next Steps

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- Create a Form Template.
- Create an Application Form.
- Add a Budget Category to the Budget Template.
- Add a Performance Goal to the Performance Plan Template.
- Prepare review and scoring for the next session.

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Customer Support

Create AmpliFund Support Account

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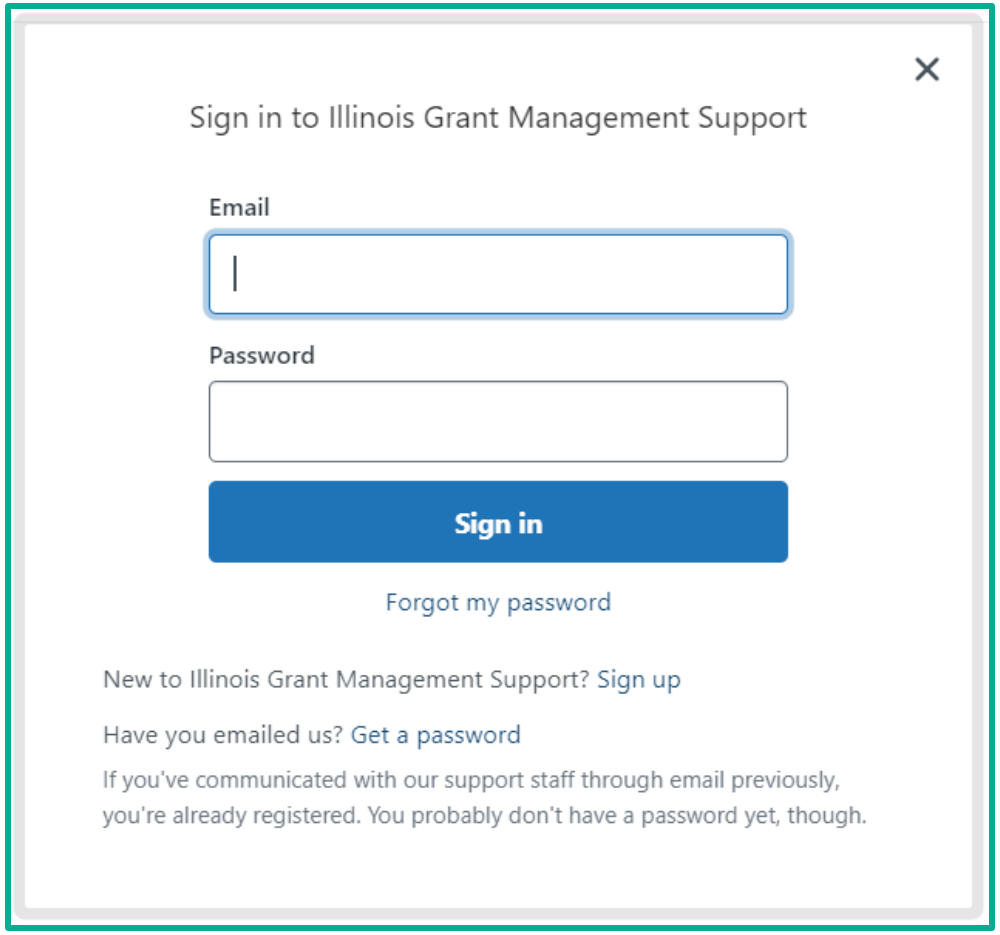
1. Access the appropriate support site.
2. Click the **Sign up** link.
3. Enter your **full name.**
4. Enter your **email address.**
5. Complete the **I'm not a robot** check.
6. Click the **Sign up** button.
7. An email from support@zendesk.com will be sent to you via email.
8. Click the link to set your password.



AmpliFund Illinois Support Portal

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Submit a support ticket:

Commercial - support@amplifund.zendesk.com.

Illinois - support@il-amplifund.zendesk.com.

Nebraska - support@ne-amplifund.zendesk.com.

Visit Support Portal:

Commercial - https://amplifund.zendesk.com.

Illinois - https://il-amplifund.zendesk.com.

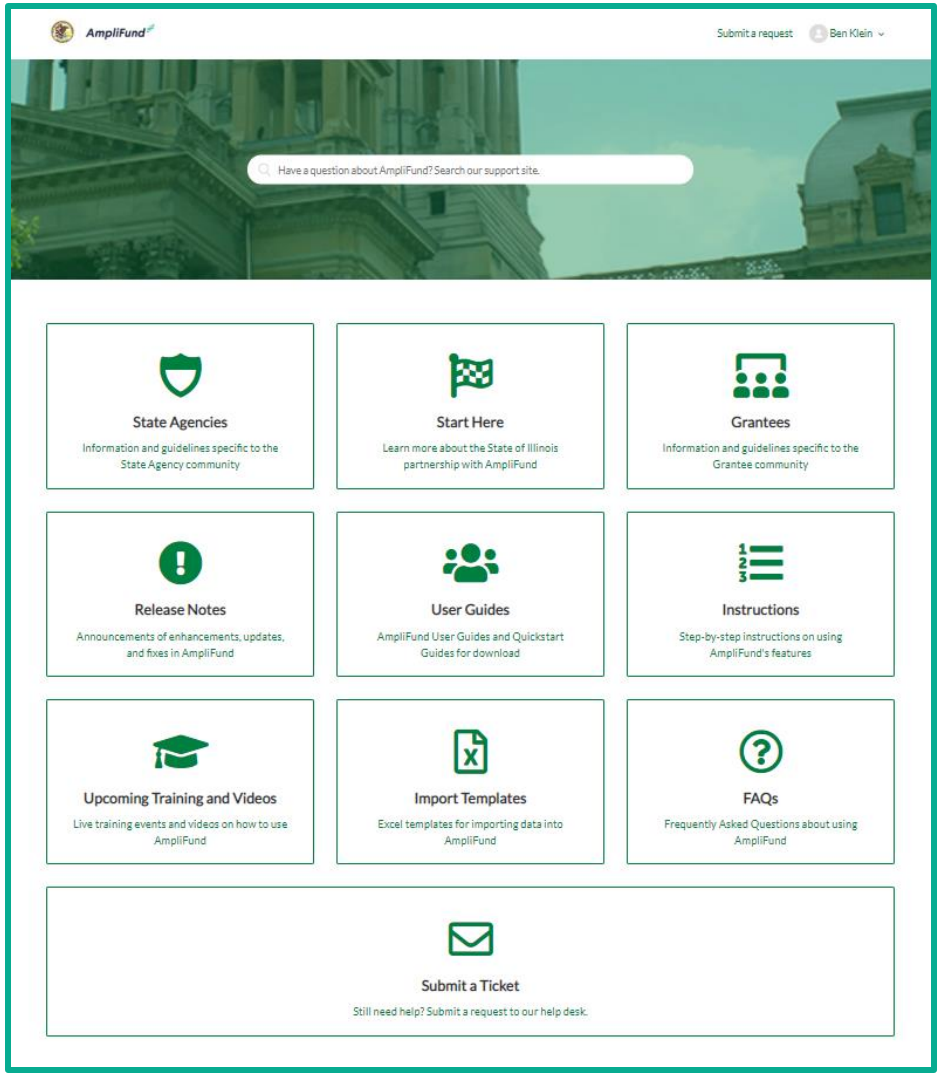
Nebraska - https://ne-amplifund.zendesk.com.

Production Site:

Commercial - https://www.gotomygrants.com.

Illinois - https://il.amplifund.com.

Nebraska - https://ne.amplifund.com.



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Question & Answer